

EDUCATION PORTAL GUIDE

California Debt and Investment Advisory Commission

Welcome to the California Debt and Investment Advisory Commission's (CDIAC) [Education Portal](#) (Ed Portal) Guide. The Ed Portal houses training for California's public finance professionals. Whether new to the field or an established expert, the Ed Portal has resources for you.

This guide is intended to serve as your comprehensive resource to navigating CDIAC's Ed Portal. Use the table of contents below to get started.

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Introduction to the Ed Portal

The Ed Portal houses original programs and webinar replays curated by CDIAC, in partnership with experts across the public finance field. Programs viewed in the Ed Portal can qualify for continuing education credits and a certificate is issued upon completion of a course. Programs are organized into three categories: Elect>Ed, Invest>Ed, and Debt>Ed.



EDUCATION FOR ELECTED OFFICIALS

Education focused on public debt financing for locally elected officials and members of governing bodies. These modules help inform public officials about the process of public debt financing.



MUNICIPAL DEBT ISSUANCE EDUCATION

Education focused on important public debt issuance topics. These webinar replays cover a range of topics including the fundamentals of debt issuance, green bond issuance, and climate change disclosure.



PUBLIC FUND INVESTMENT EDUCATION

Education focused on important public fund investments topics. These webinar replays cover a range of topics including the fundamentals of public fund investing and socially responsible investing.

CREATING YOUR ACCOUNT

To access [CDIAC's Ed Portal](#), you must register an account. Follow the steps below to do so. Note that users must login at least once every six months to maintain their account, or they will be deemed inactive and have their account disabled.

1



Don't have an account? [Register now](#)

Welcome to the CDIAC Education Portal

Email

This field is required

Password

This field is required

[Forgot your password?](#)

[Log in](#)

2

Register for CDIAC

Email

Password

Confirm password

[Register](#)

[Log in](#)

3

Terms

By selecting the Accept button, I acknowledge the content contained in this portal is designed to provide accurate and authoritative information in regard to the subject matter covered; it has been provided with the understanding that neither the presenters nor CDIAC are engaged in rendering debt management, municipal finance, investment, accounting, legal, or other professional services. Educational content should not be construed as providing legal or financial advice or opinions on any specific facts. Participants should consult appropriate professional advisors if such services are sought. Participants should note that each public agency is unique, and while educational content can be of use to various types of public agencies not everything contained in this portal is applicable to every public agency.

I further acknowledge that I can contact CDIAC at CDIAC.Education@treasurer.ca.gov or (916) 653-3269 if disability accommodations are needed to access content in this portal.

[Accept](#) [Decline](#)

4

Confirmation email sent to

You should receive an email confirming your account in the next few minutes. If you don't get it, please check your spam folder.

[Log in](#) or [Register with a different email](#)



CDIAC Education Portal <notifications@advancedproblemsolving.org>
to tagali

4:50 PM (3 minutes ago) ☆ ↶ ⋮

Welcome

You can confirm your account through the link below:

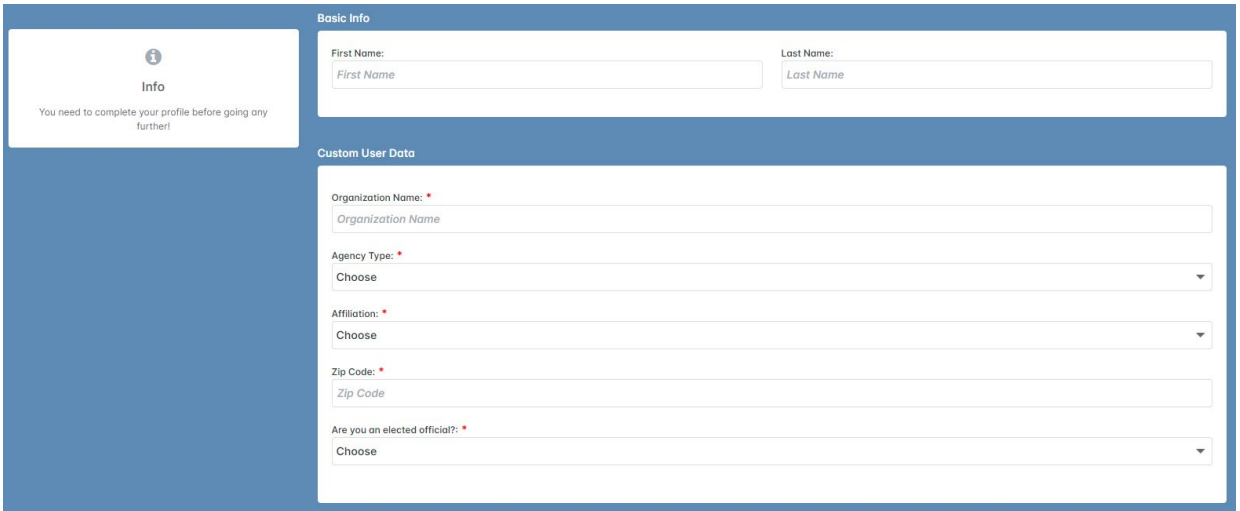
https://edportal.treasurer.ca.gov/users/confirmation?confirmation_token=D08EFG6vTanoCUKki_A0g

Regards,
CDIAC Education Portal
...

You might also consider adding notifications@advancedproblemsolving.org to your safe-senders/contacts list so as to prevent our emails going to your spam folder.

CREATING YOUR ACCOUNT

Continued



The screenshot shows a web form for creating an account. On the left, there is a blue sidebar with an 'Info' icon and a message: 'You need to complete your profile before going any further!'. The main form area is titled 'Basic Info' and contains two input fields: 'First Name' and 'Last Name'. Below this is a section titled 'Custom User Data' with several fields: 'Organization Name' (text input), 'Agency Type' (dropdown menu), 'Affiliation' (dropdown menu), 'Zip Code' (text input), and 'Are you an elected official?' (dropdown menu). Each field has a red asterisk indicating it is required.

**** Note that your full name and organization will be present on your certificates of attendance**



CDIAC Education Portal <notifications@advancedproblemsolving.org>
to

12:49 PM (30 minutes ago) ☆ ↩ ⋮

Welcome

You have successfully confirmed your account.

If you need to login to your account at any time you can do so by accessing the link below.

http://edportal.treasurer.ca.gov/users/sign_in

Regards,
CDIAC Education Portal.

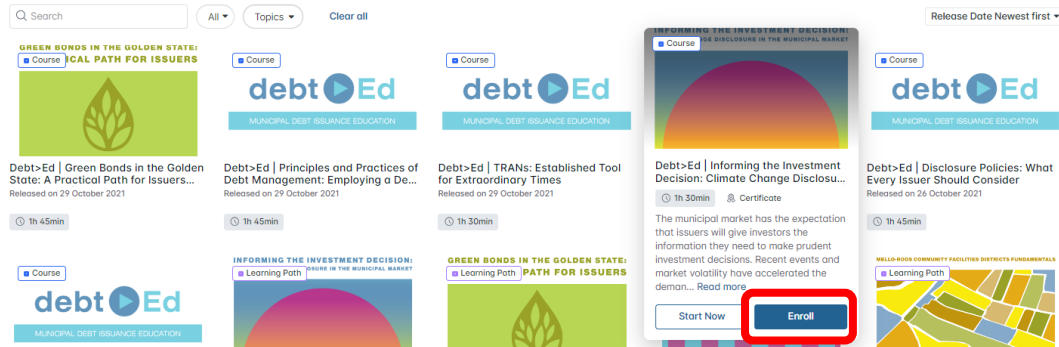
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You might also consider adding notifications@advancedproblemsolving.org to your safe-senders/contacts list so as to prevent our emails going to your spam folder.

REGISTERING FOR A COURSE

Users can enroll in courses via the [Course Catalog](#). Hover over your course of interest and click “Enroll” to register for the course without starting and to see its description and content. Alternatively, you can click “Start Now” to navigate directly to the course’s modules.

Explore your learning options



You will then be taken to the course’s homepage where you can find the course’s details and content. Click “Start Now” to navigate to the course’s modules.

INFORMING THE INVESTMENT DECISION: CLIMATE CHANGE DISCLOSURE IN THE MUNICIPAL MARKET



ENROLLED ON SEP 18, 2024

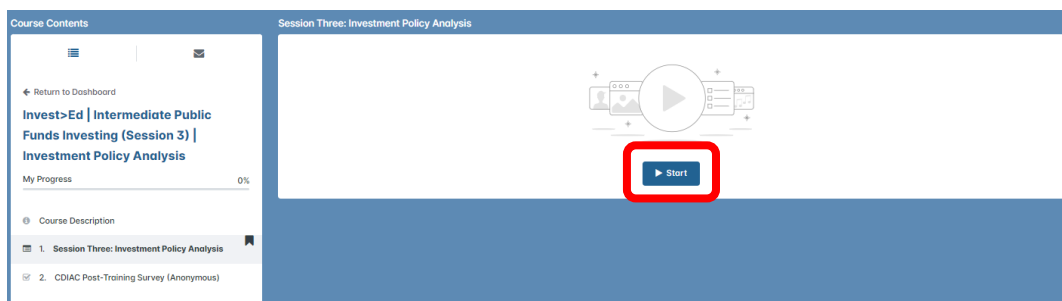
Debt>Ed | Informing the Investment Decision: Climate Change Disclosure in the Municipal Market (Session 2) | The State of Climate Change Disclosure: Issuer Approaches and Practices

Start Now

CONTENT
2 modules

COURSE LENGTH
90 minutes

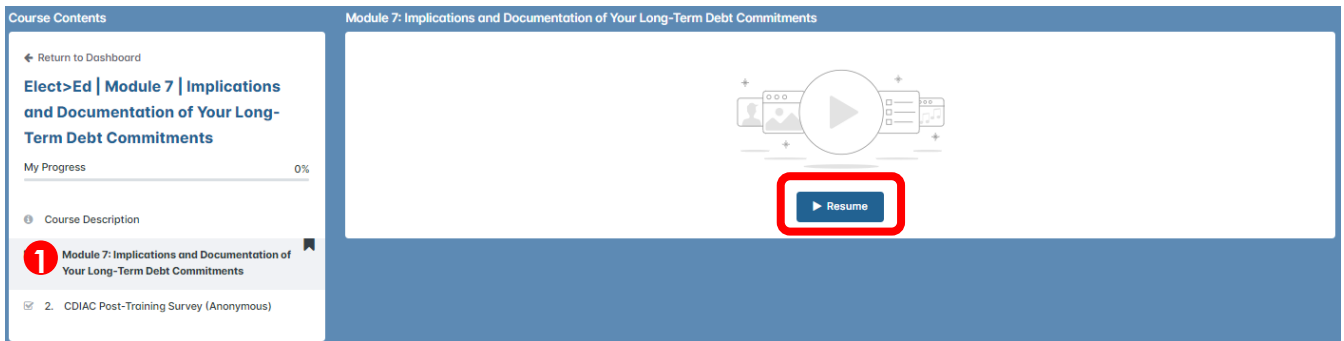
To begin the course, click “Start”. You will be redirected to the first module’s content, which may include videos, presentations, and supplemental resources.



COMPLETING A COURSE

To complete a course, you must finish all modules in that course. This may include videos, surveys, and/or quizzes.

For example, the *Elect>Ed | Module 7 | Implications and Documentation of Your Long-Term Debt Commitments* course requires the user to complete a series of videos and quizzes before earning a certificate.



When you start or resume the course, you will be taken to the course’s content. For the Elect>Ed series, this is generally a collection of short videos followed by a series of questions. To successfully complete the course, you must score an 80% or higher.

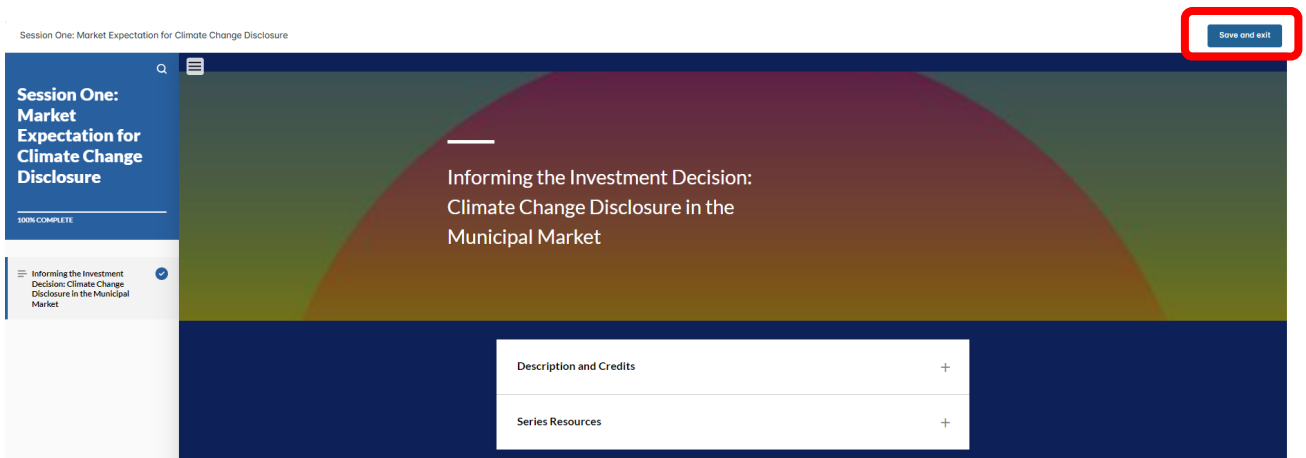
When exiting a course, do not forget to click “Save and exit” at the top-right of your screen to save your progress.



COMPLETING A COURSE

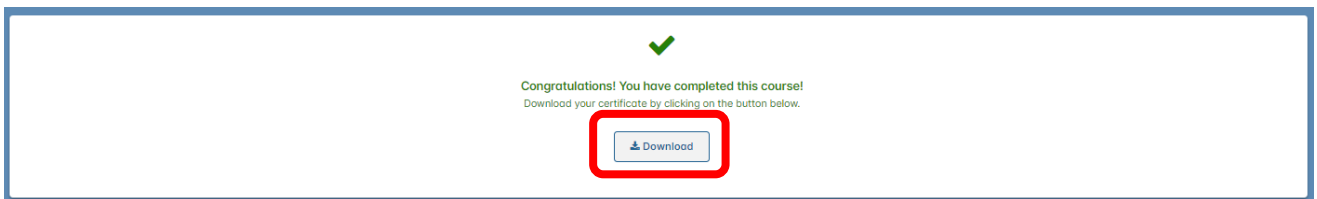
Some courses may be organized differently, but the process for completing a course is similar. For example, *Informing the Investment Decision: Climate Change Disclosure in the Municipal Market* will display all materials on one page above the video.

When exiting a course, do not forget to click “Save and exit” at the top-right of your screen to save your progress. It is recommended that users do not exit the video prior to completing it to ensure all progress is saved.



After completing all modules in a course and clicking “Save and Exit”, you will receive a dialog box notifying you that you have completed the course. Consider leaving an optional review to aid CDIAC in tailoring future programming to best meet the needs of our constituents.

Now, you can download your certificate:



HOME PAGE

Navigation Guide

The screenshot shows the CDIAC Education Portal homepage. At the top, a navigation bar (A) includes links for Home, My Learning, and Catalog, along with a search bar (B). On the right, there are icons for an inbox (C), account details (D), and a time zone selector (TZ). Below the navigation bar is a large banner (E) with the CDIAC logo and three course categories: debtEd (Municipal Debt Issuance Education), investEd (Public Fund Investment Education), and electEd (Education for Elected Officials). The banner includes a welcome message and a 'VIEW COURSES' link. Below the banner, a personalized greeting 'Hi Trista, welcome back!' is displayed. To the left, a filter bar (F) allows users to switch between 'Courses' and 'Learning paths'. Below this, the 'Learning in progress' section (G) shows three active courses with progress bars and completion status. Below that, the 'Learning not started' section (H) displays three upcoming courses with their respective details and durations. On the right side, a 'My live sessions' calendar (I) shows the month of September 2024, with the 19th highlighted. Below the calendar is a placeholder for live sessions.

A Page Navigation

Home: your dashboard, including learning in progress, not started, and upcoming CDIAC events

My Learning: your enrolled, in progress, and completed courses

Catalog: list of all courses currently published by CDIAC.

B Search: Search for courses you are enrolled in.

D Account Details & Settings

F Filter: Filter your learning by courses or learning path

H Learning Not Started

C Inbox: Send and receive messages.

E Clickable Banner: Click on the first banner image to navigate to the *Course Catalog*

G Learning in Progress

I CDIAC Event Calendar

MY LEARNING

Navigation Guide

The screenshot shows the 'MY LEARNING' interface. At the top, there's a navigation bar with 'CDIAC | EDUCATION PORTAL', 'Home', 'My Learning', and 'Catalog' links. A search bar and a 'Download training history' button are on the right. The main content area displays a grid of course cards. Each card includes a course title, a progress bar, a status bar, and a certificate icon. The cards are labeled with letters A through F, corresponding to the navigation guide items.

A Page Navigation

Home: your dashboard, including learning in progress, not started, and upcoming CDIAC events
My Learning: your enrolled, in progress, and completed courses
Catalog: list of all courses currently published by CDIAC.

B Download All-Time Training History as a PDF or CSV

C Filter by Course or Learning Path

D Search Your Not Started, In Progress, and Completed Courses

E Filter by Status or Topic

F Course Status Bar

CATALOG

Navigation Guide

The screenshot shows the CDIA Education Portal Catalog page. At the top, there is a navigation bar with links for Home, My Learning, and Catalog, along with a search bar and a user profile icon. Below the navigation bar, the page title 'Catalog' is displayed. A large blue box on the left contains the text 'CDIAC COURSE CATALOG'. To the right of this box, there is a paragraph explaining the catalog's purpose and two sections: 'LEARNING PATHS' and 'FILTER CATALOG'. Below the text, the main catalog area displays a grid of course cards. Each card includes a course title, release date, rating, and duration. Callouts A through F are placed over various elements: A points to the navigation bar, B points to the search bar, C points to the 'All' filter button, D points to the 'Topics' dropdown menu, E points to a course card (Debt>Ed | An Integrated Approach to Strategic Pension Liability...), and F points to the page navigation bar at the bottom right.

A Page Navigation

Home: your dashboard, including learning in progress, not started, and upcoming CDIA events
My Learning: your enrolled, in progress, and completed courses
Catalog: list of all courses currently published by CDIA.

B Search: Search for any of CDIA's published courses.

D Filter by Topic

F Page Navigation

C Filter by Course or Learning Path

E Hover Over a Course for Its Details or to Start

Note: Courses that you are already enrolled in, including those not started, in progress, and complete, will not appear in the course catalog. Instead, these are listed on the *My Learning* page.